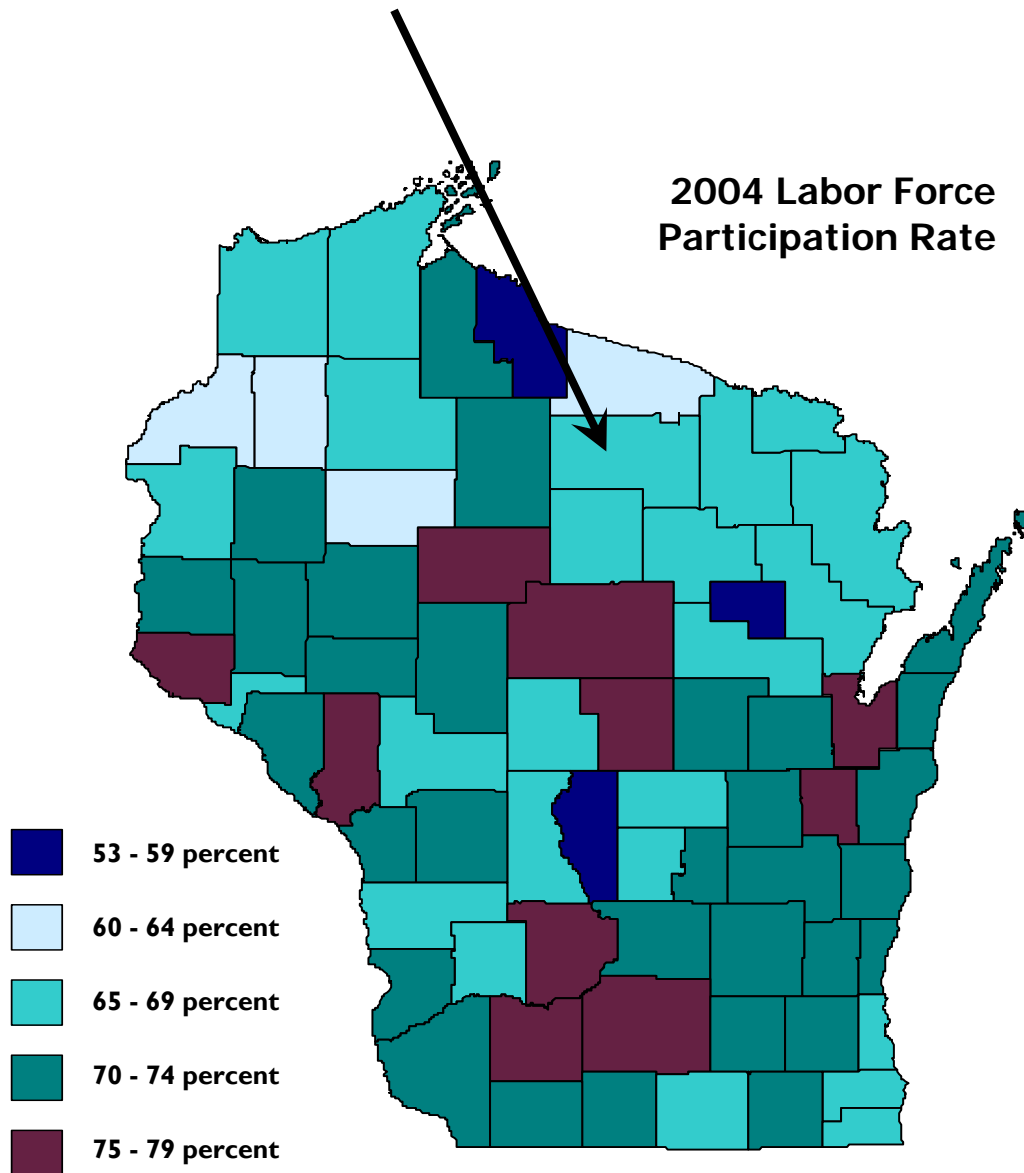


Oneida County Workforce Profile



Source: Estimates created by DWD, OEA using data supplied by
U.S. Bureau of Labor Statistics and U.S. Bureau of Census

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State of Wisconsin
Department of Workforce Development
Office of Economic Advisors

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County Population and Labor Force

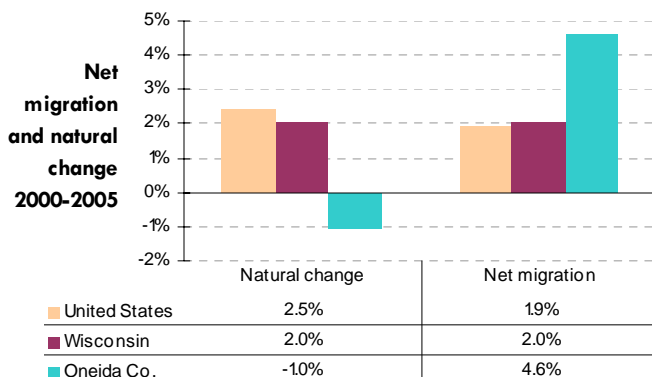
Population trends affect the supply of workers, the willingness of employers to open, expand or continue local operations and the demand for goods and services. The City of Rhinelander annexed residential land that had been part of the Town of Pelican, distorting population figures for both. Often a rural county's natural population change (births minus deaths) will be smaller than its net migration (people moving in minus people moving out). This trend is particularly pronounced in Oneida County because it experienced fewer births than deaths (a negative rate of natural change). Wisconsin demographers expect the number of births to be equal to or less than the number of deaths in Oneida County through 2030 and expect net migration to slow by about a third.

The table to the right shows that Oneida County's labor force participation rate (66.8%) is between Wisconsin's (70.8%) and the nation's (65.4%). The county's rate of population growth (3.5%) trails the state's (4.0%) and the nation's (4.9%). Narrowing the focus to the 16-and-over population shows that Oneida County has low concentrations of 16- to 24-year-olds and 25- to 59-year-olds and a high concentration of residents 60 or more years old. Population projections suggest that by 2020 residents aged 60 or more will constitute a higher proportion of the 16-and-over population in Oneida County (40.0%) than in Wisconsin (28.6%) or in the United States (29.4%).

Five largest municipalities in Oneida County

	April 2000 Census	Jan. 1, 2005 estimate	Numeric change	Percent change
Oneida County	36,776	38,073	1,297	3.5%
Rhinelander, City	7,735	8,052	317	4.1%
Minocqua, Town	4,859	5,174	315	6.5%
Pine Lake, Town	2,720	2,858	138	5.1%
Newbold, Town	2,710	2,845	135	5.0%
Pelican, Town	2,902	2,628	-274	-9.4%

Source: Wis. Dept. of Administration, Demographic Services, August 2005



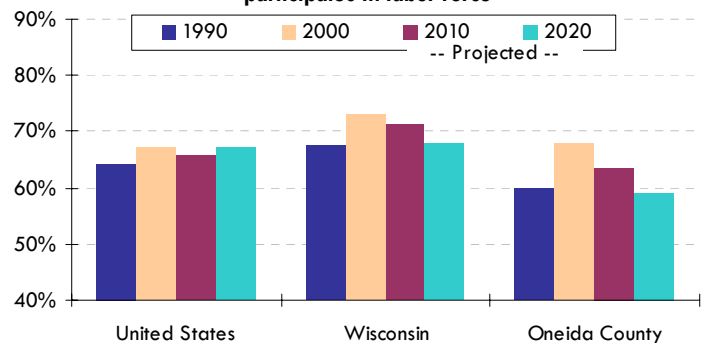
Source: WI Dept. of Admin., Demographic Services & US Census Bureau

Population and Labor Force

	United States	Wisconsin	Oneida County
Total population in 2000	281,424,602	5,363,715	36,776
Population est. Jan. 1, 2005	295,160,302	5,580,757	38,073
Change	13,735,700	217,042	1,297
% change	4.9%	4.0%	3.5%
2005 Labor force population*	224,837,000	4,339,938	31,126
Share of total population	76.2%	78%	81.8%
Labor force	147,125,000	3,071,179	20,791
Labor force participation rate	65.4%	70.8%	66.8%
2005 Population 16 yrs. & over	228,621,674	4,417,313	31,671
16-24 yrs old	37,489,370	743,764	4,363
Share of population 16+ yrs	16.4%	16.8%	13.8%
25-59 yrs old	142,248,896	2,708,865	17,597
Share of population 16+ yrs	62.2%	61.3%	55.6%
60 yrs and older	48,883,408	964,684	9,711
Share of population 16+ yrs	21.4%	21.8%	30.7%
Projected population: 2020	335,804,546	6,110,878	39,254
Population 16 yrs. & over	264,085,104	4,869,573	33,612
16-24 yrs old	37,918,865	681,586	2,603
Share of population 16+ yrs	14.4%	14.0%	7.7%
25-59 yrs old	150,678,402	2,756,884	17,569
Share of population 16+ yrs	57.1%	56.6%	52.3%
60 yrs and older	75,487,837	1,431,103	13,440
Share of population 16+ yrs	28.6%	29.4%	40.0%

* civilian population 16 yrs. and older not in an institution

Percent of labor force age population that participates in labor force



Source: special tabulation by OEA using US Census, US Bureau of Labor Statistics, WI Dept. of Admin. estimates and projections

Labor force participation rates drop substantially as workers approach 60 years old and continue to drop as they age. As a greater share of the population joins age groups where employment is less common, labor force growth could be restrained or reversed. This trend could be magnified if 60-and-over residents demand more services than younger ones.

Revised Labor Force

All labor force estimates published from 1990 to 2004 have been revised. The more recent years reflect trends revealed during Census 2000 while the 1990s were updated to include changes from 1990 to 2000 but are still based on ratios from the 1990 census.

The annual averages in the table to the right hide seasonal fluctuations. In 2004 Oneida County's unemployment rate peaked at 8.6 percent in March and dipped to 4.2 percent in September. The labor force estimate bottomed out around 20,200 in February and peaked around 22,000 in August.

After the recession of the early 1990s, unemployment rates fell. Rates from the early years of the current decade reaffirm that unemployment rates are a lagging indicator of economic recovery. By the time cyclical unemployment rates peak, other economic indicators have been in more encouraging territory for a while. In Oneida County, as in the nation, the 2003 unemployment rate represents a recent peak, but the labor force estimate has been growing much more slowly after this recession than after the last.

Oneida County Civilian Labor Force Estimates

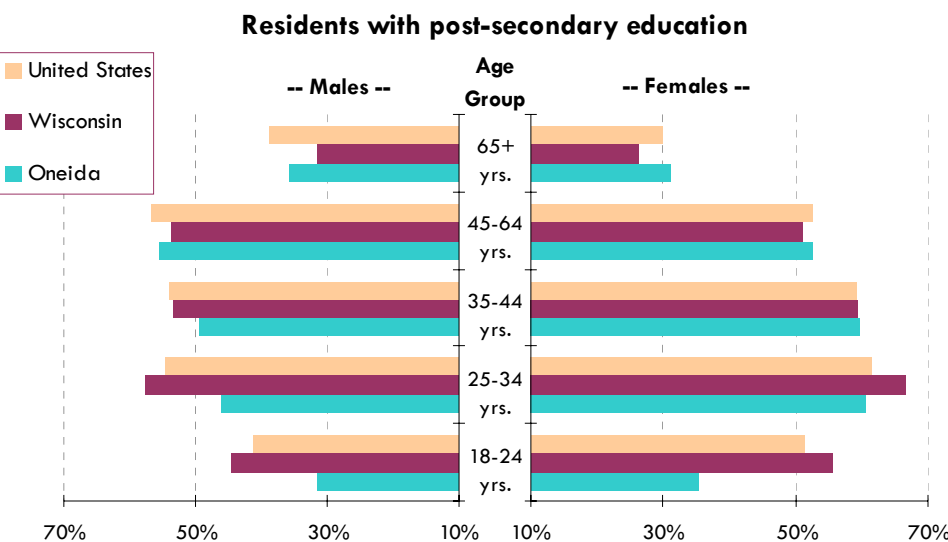
	Labor force	Employed	Unemployed	Unemployed rate
1990	16,042	15,325	717	4.5%
1991	16,523	15,707	816	4.9%
1992	17,383	16,513	870	5.0%
1993	18,317	17,427	890	4.9%
1994	18,723	17,787	936	5.0%
1995	19,762	18,865	897	4.5%
1996	20,311	19,452	859	4.2%
1997	20,524	19,576	948	4.6%
1998	20,456	19,513	943	4.6%
1999	20,586	19,687	899	4.4%
2000	19,775	18,822	953	4.8%
2001	20,081	18,992	1,089	5.4%
2002	20,493	19,170	1,323	6.5%
2003	20,610	19,200	1,410	6.8%
2004	20,791	19,580	1,211	5.8%

Source: DWD, Bureau of Workforce Information, Local Area Unemployment Statistics, September 2005

Education Attainment

The graph below shows a shift from older generations, where females have less post-secondary education than males to younger generations where females have more education. As the economy shifted from male-dominated goods-producing industries to more balanced service-providing industries, social attitudes and employment laws changed to make education more economically valuable for females.

In the 65-and-over cohort, Oneida County's residents are more likely than U.S. residents to have a bachelor's degree (9.3 percent versus 8.9 percent). Roughly 15.6 percent of the county's 25-34 cohort has bachelor's degrees. This reflects a higher concentration than any other cohort in the county. However, the nation's 20.3 percent concentration of bachelor's degrees reflects greater strides.



Source: US Census 2000, Summary file 3, QT-P20

A somewhat converse dynamic emerges when isolating associate degrees. Among the 65-and-over cohort, Oneida County residents are less likely than U.S. residents to have associate degrees (2.1 percent versus 2.5 percent). Oneida County pulls into the lead in the 45-64 and widens its lead with each successive cohort until its 25-34 cohort is one-and-a-half times as likely to report associates degrees (11.6 percent versus 7.5 percent). Workers in education & health and in manufacturing have seen the value of technical training increase and the availability of transferable on-the-job training diminish over the last two or three generations.

Employment and Wages

Educational attainment may be as much a product of employment and wage structure as a cause. Oneida County establishments pay wages about a fifth below the statewide all-industries average. The trade, transportation & utilities sector accounts for 26.5 percent of total employment and 22.7 percent of total wages. Some segments with high wages, like wholesale trade (\$37,885) and utilities (\$65,137) offer relatively low employment concentrations in Oneida County while other lower-wage sub-segments, like general merchandise stores (\$17,656) and food & beverage stores (\$16,079) offer higher employment concentrations in Oneida County. The retail segment dominated the trade, transportation & utilities sector with 3,715 out of the sector's 4,680 jobs and adding 251 between 2003 and 2004 (while the sector added a total of 272 jobs).

Within the education & health services sector, the nursing & residential care sub-segment and the ambulatory health services sub-segment offered relatively high concentrations of jobs, and their average wages (\$16,981 and \$47,646, respectively) differed widely. Between 2005 and 2030, every age group containing residents under 60 years old is projected to

Average Annual Wage by Industry Division in 2004

	2004	2004		
	Average Annual Wage	Average Annual Wage	Percent of	1-year
	Wisconsin	Oneida County	Wisconsin	% change
All Industries	\$ 34,749	\$ 27,539	79.3%	4.0%
Natural resources	\$ 27,399	\$ 25,490	93.0%	8.5%
Construction	\$ 41,258	\$ 33,079	80.2%	3.0%
Manufacturing	\$ 44,145	\$ 43,214	97.9%	6.5%
Trade, Transportation, Utilities	\$ 30,088	\$ 23,569	78.3%	3.6%
Information	\$ 41,759	\$ 30,358	72.7%	Not avail.
Financial activities	\$ 45,103	\$ 37,014	82.1%	7.0%
Professional & Business Services	\$ 39,580	\$ 22,993	58.1%	1.1%
Education & Health	\$ 36,408	\$ 34,267	94.1%	5.8%
Leisure & Hospitality	\$ 12,295	\$ 11,140	90.6%	4.6%
Other services	\$ 20,207	\$ 15,847	78.4%	0.9%
Public Administration	\$ 36,347	\$ 34,447	94.8%	0.5%

Source: WI DWD, Bureau of Workforce Information, Quarterly Census of Employment & Wages

shrink while the 60-and-over population adds over 5,000 people or 59 percent. This suggests more growth potential for health services than education services.

To a greater degree than the retail trade segment, the leisure & hospitality sector pulls down the overall average wage (\$11,140) and high average employment (2,307). In particular, the food service and drinking segment has a high concentration of jobs (1,541) and a low average annual wage (\$9,941). Retirees and visitors boost leisure & hospitality employment, but the sector's wages may not keep up with housing costs.

2004 employment and wage distribution by industry in Oneida County

	Employment		Total payroll		
	Annual average	1-year change		% of Total Employment	% of Total Payroll
Natural Resources	210	-27	\$ 5,352,944		
Construction	1,209	-20	\$ 39,992,302		
Manufacturing	1,410	-43	\$ 60,932,240		
Trade, Transportation, Utilities	4,680	272	\$ 110,300,643		
Information	382	suppressed	\$ 11,596,825		
Financial Activities	537	4	\$ 19,876,581		
Professional & Business Services	1,059	69	\$ 24,349,786		
Education & Health	4,126	-27	\$ 141,387,144		
Leisure & Hospitality	2,307	-60	\$ 25,700,119		
Other services	704	-7	\$ 11,156,382		
Public Administration	1,030	-4	\$ 35,480,626		
Not assigned	0	Not avail.	\$ 0		
All Industries	17,652	139	\$ 486,125,592		

Source: WI DWD, Bureau of Workforce Information, Quarterly Census Employment and Wages, June 2005

Industry and Employers by Size

Top 10 Employers in Oneida County

Establishment	Product or Service	Size (Dec. 2004)
Howard Young Medical Group	Outpatient mental health centers	500-999 employees
Petersen Health Care of Wisconsin	Homes for the elderly	500-999 employees
Sacred Heart - St Mary's Hospitals	Gen. medical & surgical hospitals	500-999 employees
Foster & Smith Inc	Mail-order houses	500-999 employees
Wal-Mart Associates Inc	Discount department stores	500-999 employees
Rhineland Paper Co Inc	Paper, except newsprint, mills	500-999 employees
School District of Rhineland	Elementary & secondary schools	500-999 employees
T A Solberg Co Inc	Solid waste collection	250-499 employees
Employment Options of North Central	Temporary help services	250-499 employees
County of Oneida	Executive & legislative offices, combined	250-499 employees

Source: DWD, Bureau of Workforce Information, ES-202, July 2005

Prominent industries in Oneida County

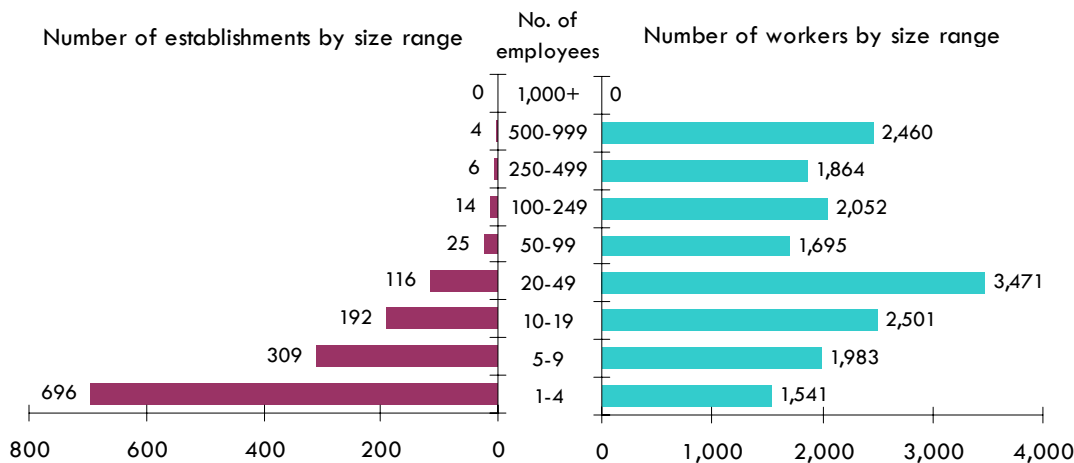
NAICS title	March 2005		Numeric change in employees	
	Establishments	Employees	2004-2005	2000-2005
Food services and drinking places	118	1,329	-28	9
Educational services	12	1,291	59	-56
Hospitals	*	*	not avail.	not avail.
Ambulatory health care services	54	837	-13	79
General merchandise stores	11	785	54	150
Nursing and residential care facilities	*	*	not avail.	not avail.
Nonstore retailers	*	*	not avail.	not avail.
Administrative and support services	33	571	86	26
Paper manufacturing	*	*	not avail.	not avail.
Food and beverage stores	13	530	2	-45

* data suppressed to maintain employer confidentiality

Column headings revised 02/06

Source: DWD, Bureau of Workforce Information, ES-202, September 2005

Oneida County establishments and workers by employment size range in 2004



(1) Data not available due to suppression factors

Source: DWD, Bureau of Workforce Information, Table 221, July 2005

Some employers and industries offer goods or services primarily for local consumption. The future of such employers relies on local income and demographic trends. All but two of the top employers and all but three of the prominent industries listed rely primarily on local revenue.

Other employers and industries (such as mail-order houses, paper mills and food service & drinking places) generate revenue from outside the county. Seasonality and part-time schedules limit wages and advancement at food service & drinking places. Productivity increases and industry consolidation restrain employment growth in paper mills. Technologies that allow mail-order nonstore retailers to do business anywhere may also help them move more easily. Discount retail giants have international presence and international supply chains, but individual stores usually draw money primarily from local communities. Retail trade is seldom a high-wage sector.

The graphs to the left show large numbers of establishments with small numbers of employees, small numbers of establishments with large numbers of employees, and employment distributed evenly among large and small establishments.

Per Capita Personal Income

While page 3 discussed wages paid by Oneida County employers, this section focuses on income received by Oneida County residents, regardless of whether the income is the result of work outside the county, investment/pension payment or government transfer such as Social Security or other income support programs. The table below shows that Oneida County's 2003 Per Capita Personal Income (PCPI) of \$28,646 was 22nd among Wisconsin's 72 counties and the 5-year PCPI growth rate of 18.7 percent was 21st.

Areas with high PCPI often have high concentrations of professional and technical jobs or amenities that attract high-income retirees. Residents of high-PCPI suburbs often commute to take high-wage jobs in low-PCPI urban areas. As a partial offset, housing prices tend to be significantly higher in high-PCPI suburbs than in low-PCPI rural areas.

Compared to the state as a whole, Oneida County has a higher concentration of jobs in low-wage industries like leisure & hospitality and retail trade, a lower concentration of jobs in high-wage industries like manufacturing and financial activities, and low wages in professional & business services.

The high concentration of retirement-aged residents and the low labor force participation rate pull down per capita employment earnings. Net earnings constitute just 59.3 percent of the county's total income. National and state-wide figures are closer to 69 percent to 70 percent. As a share of total income, dividends, interest and rent (investment and pension income) has fallen more sharply in Oneida County since 2001 than in the state or the nation.

Meanwhile transfer payments to county residents make up 20.1 percent of the county's total income. National and state-wide figures are closer to 14 percent to 15 percent. Together, these trends may suggest that Oneida County's retirees are more likely to push up Social Security receipts than investment income or employment earnings.

Wisconsin Counties 2003 Per Capita Personal Income and Rank in State

Area	2003	Rank	5-yr growth	Rank	Area	2003	Rank	5-yr growth	Rank
United States	\$ 31,472		17.1%		Manitowoc	\$ 27,807	27	13.6%	59
Wisconsin	\$ 30,685		17.2%		Marathon	\$ 29,992	16	22.0%	5
Adams	\$ 22,804	59	16.1%	37	Marinette	\$ 25,448	39	21.3%	9
Ashland	\$ 23,204	55	16.6%	32	Marquette	\$ 22,590	64	26.5%	1
Barron	\$ 24,922	41	15.2%	44	Menominee	\$ 18,449	72	19.8%	16
Bayfield	\$ 22,660	62	13.4%	60	Milwaukee	\$ 31,419	7	19.5%	18
Brown	\$ 32,076	5	17.8%	25	Monroe	\$ 23,467	54	16.8%	31
Buffalo	\$ 29,083	20	17.2%	28	Oconto	\$ 24,842	42	12.3%	66
Burnett	\$ 22,796	60	17.1%	29	Oneida	\$ 28,646	22	18.7%	21
Calumet	\$ 31,880	6	21.4%	8	Outagamie	\$ 30,952	11	20.5%	14
Chippewa	\$ 25,999	36	12.3%	67	Ozaukee	\$ 47,527	1	14.7%	48
Clark	\$ 22,227	66	13.9%	55	Pepin	\$ 24,407	44	13.0%	64
Columbia	\$ 30,846	12	18.2%	24	Pierce	\$ 27,963	26	18.6%	23
Crawford	\$ 22,628	63	20.9%	13	Polk	\$ 24,201	46	13.9%	54
Dane	\$ 36,455	3	21.0%	12	Portage	\$ 27,464	30	21.1%	11
Dodge	\$ 26,048	35	13.3%	61	Price	\$ 24,361	45	12.2%	68
Door	\$ 30,657	13	15.9%	40	Racine	\$ 31,271	8	15.0%	45
Douglas	\$ 23,568	53	15.3%	43	Richland	\$ 23,829	51	21.9%	6
Dunn	\$ 22,885	58	14.9%	47	Rock	\$ 28,256	25	14.1%	50
Eau Claire	\$ 27,469	29	17.5%	27	Rusk	\$ 20,461	71	14.0%	52
Florence	\$ 24,146	47	25.3%	3	Sauk	\$ 28,780	21	19.5%	19
Fond du Lac	\$ 29,951	17	16.1%	38	Sawyer	\$ 23,921	50	22.3%	4
Forest	\$ 21,975	68	25.4%	2	Shawano	\$ 23,941	49	13.9%	56
Grant	\$ 24,116	48	15.6%	42	Sheboygan	\$ 31,251	9	19.8%	17
Green	\$ 28,542	23	14.0%	51	St. Croix	\$ 31,091	10	13.6%	57
Green Lake	\$ 26,962	32	8.1%	72	Taylor	\$ 23,020	56	16.6%	34
Iowa	\$ 27,308	31	19.2%	20	Trempealeau	\$ 25,242	40	18.7%	22
Iron	\$ 22,912	57	21.1%	10	Vernon	\$ 20,950	70	15.7%	41
Jackson	\$ 26,084	34	21.9%	7	Vilas	\$ 25,664	37	13.0%	63
Jefferson	\$ 29,330	18	16.5%	35	Walworth	\$ 27,626	28	13.6%	58
Juneau	\$ 22,382	65	12.7%	65	Washburn	\$ 22,794	61	16.0%	39
Kenosha	\$ 29,117	19	16.5%	36	Washington	\$ 35,196	4	14.9%	46
Kewaunee	\$ 25,536	38	8.8%	71	Waukesha	\$ 41,551	2	12.2%	69
La Crosse	\$ 28,284	24	16.8%	30	Waupaca	\$ 26,863	33	14.0%	53
Lafayette	\$ 21,983	67	10.1%	70	Waushara	\$ 21,762	69	13.2%	62
Langlade	\$ 23,739	52	20.4%	15	Winnebago	\$ 30,359	15	16.6%	33
Lincoln	\$ 24,725	43	14.6%	49	Wood	\$ 30,401	14	17.7%	26

Source: U.S. Dept. of Commerce, Bureau of Economic Analysis, Regional Economic Information System, May 2005